

The IRS requires that all custodians obtain and report the fair market valuation (FMV) (or good faith estimate), of assets held in self-directed accounts each year and/or before any taxable event.

In most cases, STRATA works directly with the investment sponsor to obtain the required valuation update. If the investment sponsor is unable to provide a valuation, it becomes the accountholder's responsibility to ensure the valuation requirement is fulfilled.

The following independent firms may be able to assist in determining the FMV of alternative investments. This list is provided for informational purposes only and does not constitute an endorsement or recommendation by STRATA Trust Company. You may choose any qualified, independent third party to complete the valuation. We recommend contacting multiple firms to compare their services, expertise, and costs before engaging a valuation provider.

To learn more about FMV valuations and annual timelines, visit STRATA's [Self-Directed IRA Knowledge Center](#).

Axiom Valuation Solutions

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Securities Quote Xchange (SQX)

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Equity Valuation Associates

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Website: www.EquityValuationAppraisals.com

SPARDATA

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